

Employee Expenses Dashboard Overview

The data in the Employee Expenses dashboard is from the Cardinal Financials Employee Expenses module. The data represents state employee expenses including expenses related to travel (e.g., lodging, meals, airfare), conferences, education reimbursement, and registration fees, that have been approved and paid. This dashboard also shows the status of employee expenses whether the expense has been submitted or approved.

Agencies that interface expense transactions into Cardinal Financials will see expenses recorded and displayed as expense type **Miscellaneous**.

The Employee Expenses dashboard contains four dashboard pages and ten reports.

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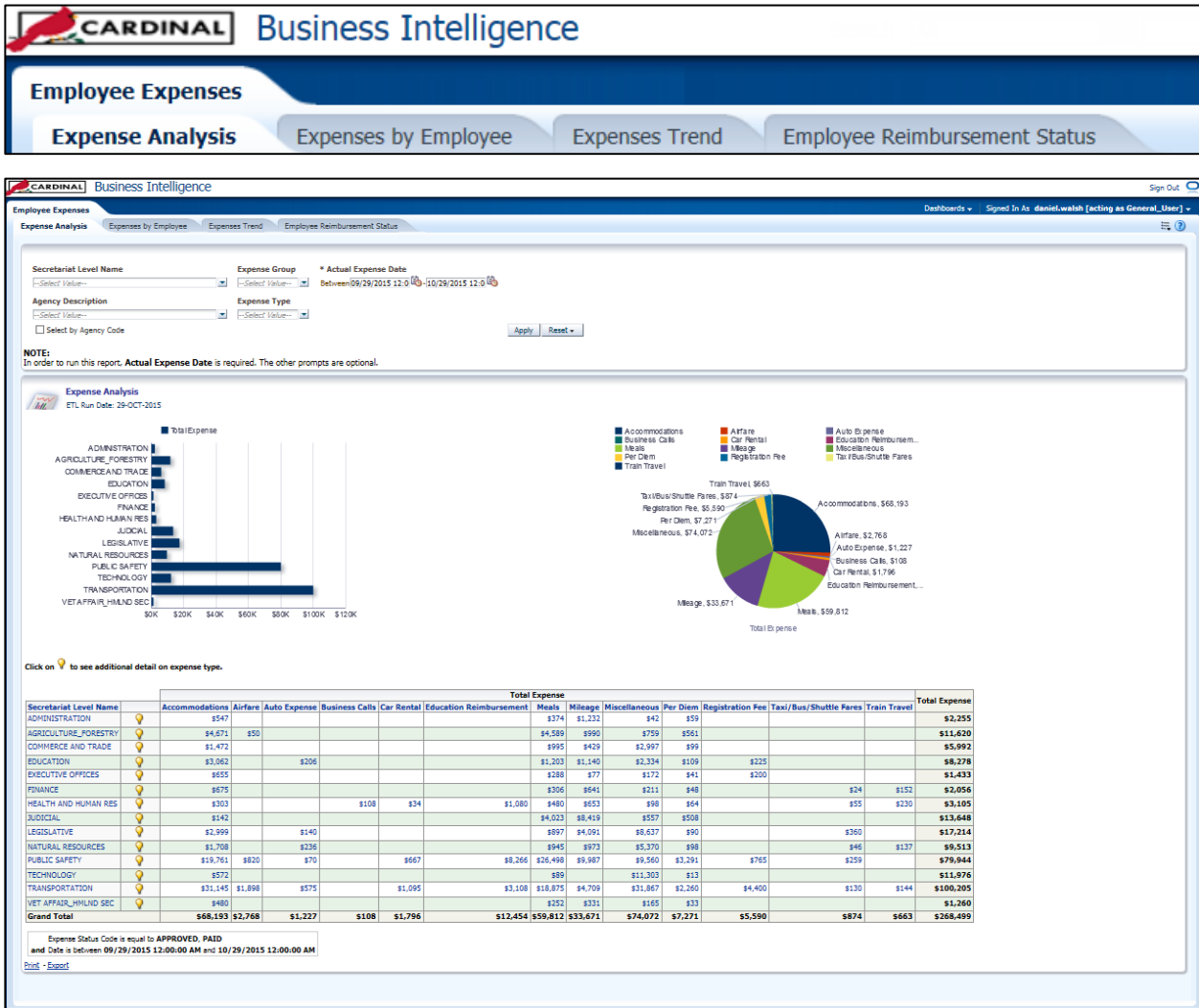
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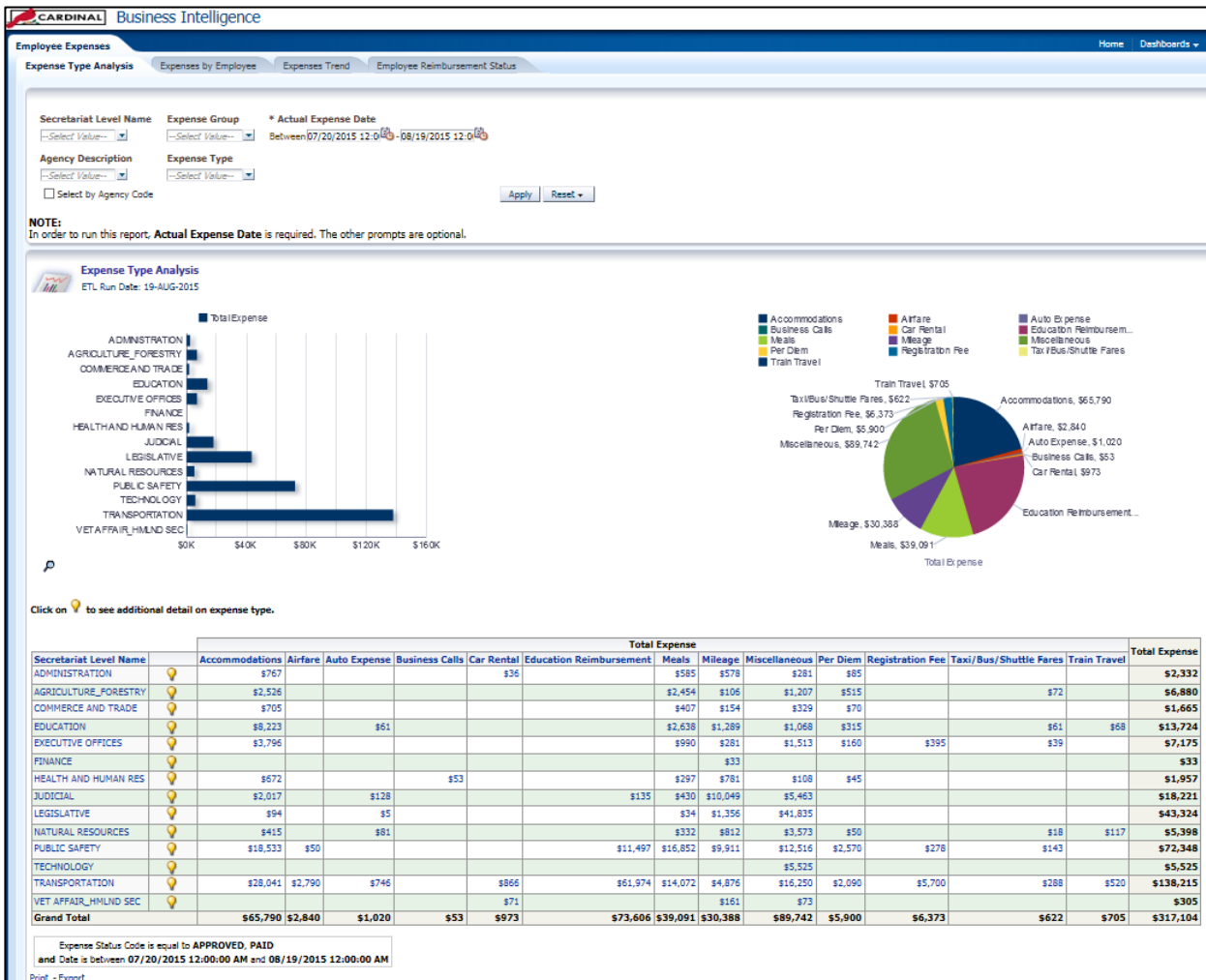
Business Intelligence Job Aid

SW BI101: Employee Expenses Dashboard

Expense Analysis (dashboard page)



1. Expense Type Analysis (report)



- REPORT ID:** BI-R.EE.0003
- LAST REVISION:** 10/28/2015
- DESCRIPTION:** The Expense Analysis report displays a bar chart showing secretariat and employee expense amount, a pie chart showing employee expense for each expense group, and a table with secretariat as rows, and expense group as columns, summed to total employee expense amount. By applying additional prompts, users can get a single secretariat level and, by using the light bulb, get detail information by department and expense groups.
- PURPOSE/USE:**
 - Identify expenses by Secretariat Level, Agency, Expense Group, Expense Type, and Department.

e. **PROMPTS:**

- Secretariat Level Name (optional)
- Agency Description/Agency Code (optional)
- Expense Group (optional)
- Expense Type (optional)
- Actual Expense Date Between (defaults to last 30 days)(required)

f. **DRILLDOWNS:**

- This report also allows user to drill down to get more detail within the same report. By clicking/drilling on expense type column header, the same report will be displayed with more detail such as drill on Expense Group **Meals** and the data will be displayed for the different type of **Meals**, such as **Breakfast – NonTravel Day**, and **Breakfast – Travel Day**.

g. **GUIDED NAVIGATION TO:**

- When user clicks on an amount in the data table/report, an option to move to report BI-R.EE.0004 Expenses by Employee is available.

h. **LIGHT BULB NAVIGATION TO:**

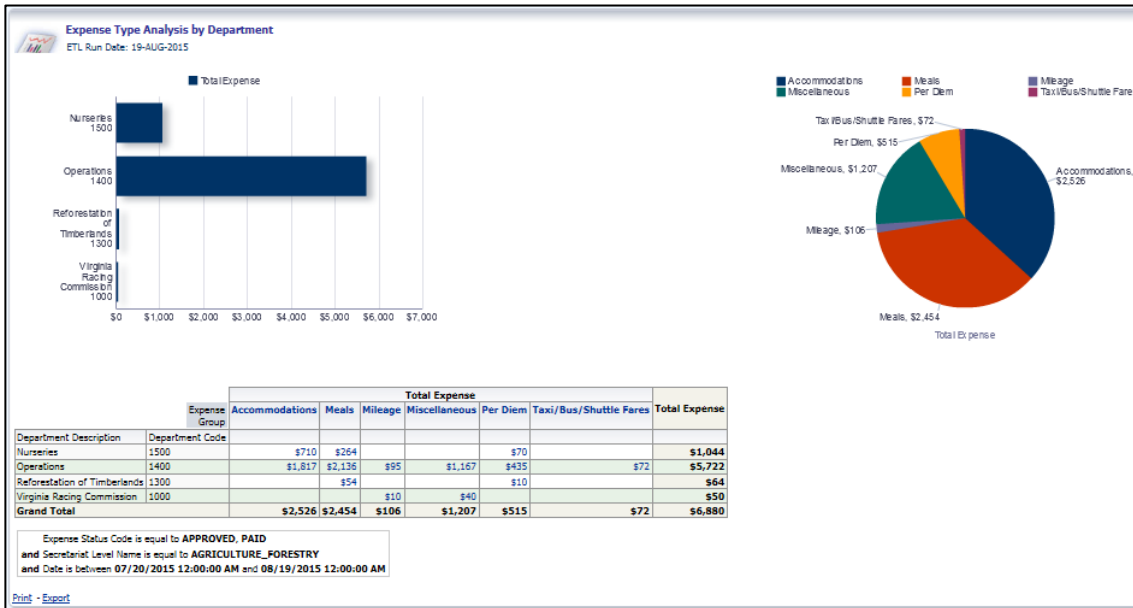
- The light bulb will take the user to the BI-R.EE.0011 Expense Analysis by Department report. This report is at the bottom of the Expense Analysis dashboard page.

i. **DATA:**

- The data included in this report is approved and paid.


j. **ADDITIONAL INFO:**

2. Expense Type Analysis by Department (report)



- REPORT ID:** BI-R.EE.0011
- LAST REVISION:** 10/28/2015
- DESCRIPTION:** The Expense Analysis by Department report is generated via the Light Bulb on the BI-R.EE.0003 Expense Analysis report. This report displays a bar chart showing department and employee expense amount, a pie chart showing employee expense for each expense group, and a table with department as rows, and expense group as columns, summed to total employee expense amount.
- PURPOSE/USE:**
 - Identify expenses by Secretariat Level, by Expense Group, by Expense Type, by Department.
- PROMPTS:** None
- DRILLDOWNS:** None
- GUIDED NAVIGATION TO:**
 - By clicking on an amount field, the user can move to the BI_R.EE.0004 Expenses by Employee report.
- LIGHT BULB NAVIGATION FROM:**
 - BI-R.EE.0003 Expense Analysis
 - BI-R.EE.0011 Expense Analysis by Department
- DATA:**
 - The data included in this report is approved and paid.
- ADDITIONAL INFO:**

Expenses By Employee (dashboard page)


CARDINAL Business Intelligence

Employee Expenses
Expense Analysis
Expenses by Employee
Expenses Trend
Employee Reimbursement Status


Secretariat Level Name
--Select Value--
Expense Group
--Select Value--
Employee Name
--Select Value--
Department Code
--Select Value--


Agency Description
--Select Value--
Expense Type
--Select Value--
Employee Number
--Select Value--
* Actual Expense Date
Between 09/29/2015 12:00:00 - 10/29/2015 12:00:00

☐ Select by Agency Code

Apply Reset

NOTE:
In order to run this report, **Actual Expense Date** is required. The other prompts are optional.


Expenses by Employee
ETL Run Date: 29-OCT-2015

Click on  to see additional detail on employee's expenses.


Employee Name	Employee Number	# of Approved Expense Reports	Total Expense
ADAMS Junior, EUGENE R	00232430100	1	\$191
ADAMS, ELIZABETH	00478236700	1	\$314
ADDINGTON, TIMOTHY	00174994800	1	\$341
ADKINS, TROY	00160726100	1	\$1,222
ADKINS, WANDA	00034928800	2	\$23
AHMED, AMR	00563588300	1	\$183
AHMED, EHAB E	00643116100	1	\$143
AKUMAH, ELINOR	00653085000	1	\$129
ALEXANDER, KENNETH	00322369300	2	\$230
ALLISON, COREY P	00646167000	1	\$677
ALTIZER Junior, F C	00052670800	1	\$158
ALTIZER, CHARLES	00054557000	1	\$1,291
AMIN, DASHEEN	00289674600	2	\$306
ANDERSON II, JAMES	00386831000	1	\$32
ANDERSON, JOSHUA	00447448000	1	\$214
ANDERSON, KENNETH	00512368900	1	\$45
ANYADIKE, BARNABAS	00230050300	1	\$51
AREIZAGA, JAIME	00496490100	1	\$212
AREY, ANTHONY C	00354749800	2	\$422
ARNIN, DONALD	00264101000	1	\$68
ARRIAGA, JENNIFER	00500375100	1	\$24
ASHBY, SHERRON	00591754200	1	\$68
ATKINS, CAROLINE	00567731200	1	\$464
ATKINS, JESSIE	00192255500	1	\$30
ATKINSON, AMY	00240905700	1	\$50
AUSTIN, ALAN	00384947800	1	\$261
AUSTIN, JEFFREY L	00164836600	1	\$145
AUSTIN, WILLIAM	00358550500	1	\$200
AVERY, MONIQUE	00301091000	1	\$141
AWBREY, DAVID	00476949100	1	\$41

Rows 1 - 30

Expense Status Code is equal to **APPROVED, PAID**
and Date is between 09/29/2015 12:00:00 AM and 10/29/2015 12:00:00 AM

Print - Export

3. Expenses by Employee (report)


Business Intelligence

Employee Expenses

Expense Type Analysis **Expenses by Employee** Expenses Trend Employee Reimbursement Status


Secretariat Level Name: Expense Group: Employee Name: Department Code:

Agency Description: Expense Type: Employee Number: * Actual Expense Date: Between 07/20/2015 12:00:00 - 08/19/2015 12:00:00

☐ Select by Agency Code

Apply Reset

NOTE:
In order to run this report, **Actual Expense Date** is required. The other prompts are optional.

Expenses by Employee
ETL Run Date: 19-AUG-2015
Click on  to see additional detail on employee's expenses.

Employee Name	Employee Number	# of Approved Expense Reports	Total Expense
ABBAMIN, MOHAMED	00590455900	1	\$197
ABDUSSALAAM, MUHAMMADBARAKAT I	00636415900	1	\$127
ADAMS, ELIZABETH	00478236700	2	\$243
ADAMS, HAROLD	00859620000	1	\$417
ADAMS, MICHAEL	00525858300	2	\$1,660
ADKINS, TROY	00160726100	1	\$1,263
ADKINS, WANDA	00034928800	1	\$27
AIKEN, TOWANA	00524748200	1	\$60
AKERS, JANICE	00274566500	1	\$18
ALLEY, MICHAEL H	00294300100	1	\$160
ALLISON, JEFFREY	00255155000	1	\$40
ALTIZER, CHARLES	00054557000	2	\$298
ALTIZER, SCOTT	00517819800	1	\$153
AMBROZY, KAREN	00160324300	1	\$178
ANDES, OLAN	00257326000	2	\$375
ANDREWS Junior, DAVID P	00060107000	1	\$84
APPEL, RICHARD E	00228578200	1	\$159
APPIAH, AMMA E	00463439100	1	\$275
ARABIA, CHRISTOPHER	00364881300	1	\$526
ARAUJO, JOSE S	00286090900	1	\$270
ARCHER-BROWNLEE, LYNNETTE	00366177500	1	\$979
AREIZAGA, JAIMIE	00496490100	1	\$7
ARMES, CHRISTOPHER J.	00273800400	1	\$93
ARMISTEAD, SARAH	00399767400	1	\$1,526
ARNTSEN, GARY	00216693800	1	\$194
ATKINS, WILLIAM H	00284093500	1	\$140
ATKINSON, AMY	00240905700	1	\$793
AXSELLE, LAUREN	00522570000	1	\$16
Adams, John	00445749300	1	\$105
Afentakis, George	00638629500	1	\$82

Rows 1 - 30

Expense Status Code is equal to **APPROVED, PAID**
and Date is between 07/20/2015 12:00:00 AM and 08/19/2015 12:00:00 AM
Print Export

- REPORT ID:** BI-R.EE.0004
- LAST REVISION:** 10/28/2015
- DESCRIPTION:** The Expenses by Employee report displays a table showing Employee Name, Employee Number, Number of Approved Employee Expense Reports, and Total Expense Amount. By applying additional prompts, users can get a single Secretariat Level, Agency, Expense Group, Expense Type, Employee and/or Department information for a specific Actual Expense Date range.

d. **PURPOSE/USE:**

- Identify expenses by Secretariat Level, Agency, Expense Group, Expense Type, Employee Name, Employee Number or Department Code.

e. **PROMPTS:**

- Secretariat Level Name (optional)
- Agency Description/Agency Code (optional)
- Expense Group (optional)
- Expense Type (optional)
- Employee Name (optional)
- Employee Number (optional)
- Department Code (defaults to last 30 days) (optional)
- Actual Expense Date Between (required)

f. **DRILLDOWN:** None

g. **GUIDED NAVIGATION TO:**

- Click on Total Expense amount related to an employee and it will take the user to the BI-R.EE.0009 Employee Expenses Summary report or to the BI-R.EE.0010 Employee Expenses Detail report.

h. **GUIDED NAVIGATION FROM:**

- BI-R.EE.0003 Expense Type Analysis

i. **LIGHT BULB NAVIGATION TO:**

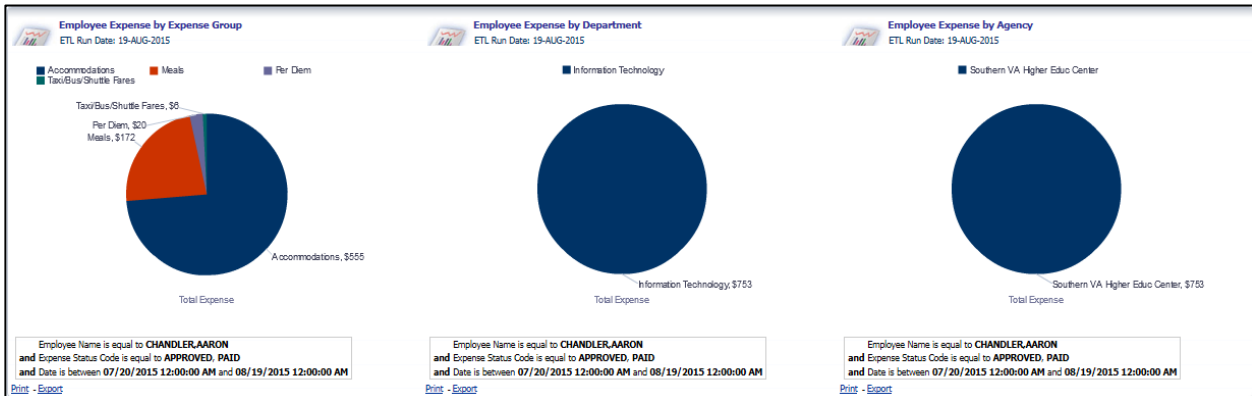
- The light bulb will take the user to another report, the BI-R.EE.0008 Expenses by Employee report.

j. **DATA:**

- The data included in this report is approved and paid.


k. **ADDITIONAL INFO:**

4. Employee Expense by Expense Group/by Department/by Agency (report)




- REPORT ID:** BI-R.EE.0006, 0007, 0008
- LAST REVISION:** 10/28/2015
- DESCRIPTION:** The Employee Expense by Expense Group, Department and Agency report displays a pie chart that shows Employee Expense by Expense Group, Department, and Agency.
- PURPOSE/USE:**
 - Identify employee expenses by expense group, department and agency.
- PROMPTS:** None
- DRILLDOWNS:** None
- GUIDED NAVIGATION FROM:** None
- GUIDED NAVIGATION TO:**
 - User can click on an amount in the data table/report and navigate to the following report(s).
 - Employee Expense Summary
 - Employee Expense Detail
- LIGHT BULB NAVIGATION FROM:**
 - Expenses by Employee
- DATA:**
 - The data included in this report is approved and paid.
- ADDITIONAL INFO:**

5. Employee Expenses Summary (report)

CARDINAL Business Intelligence						
Employee Expenses						
 Employee Expenses Summary ETL Run Date: 19-AUG-2015						
Employee Name	Employee Number	Expense Report Number	Submit Date	Source Expense Reason Name	Total Expense Miscellaneous	Total Expense
MITCHELL,JENNIFER	00354071600	RPT2049788	6/3/2015	Other	\$2,729	\$2,729
MITCHELL,JENNIFER	00354071600	RPT2049800	6/5/2015	Other	\$551	\$551
MITCHELL,JENNIFER	00354071600	RPT2049801	6/5/2015	Other	\$288	\$288
MITCHELL,JENNIFER	00354071600	RPT2049807	6/5/2015	Other	\$517	\$517
MITCHELL,JENNIFER	00354071600	RPT2049808	6/5/2015	Other	\$853	\$853
MITCHELL,JENNIFER	00354071600	RPT2050098	7/14/2015	Other	\$2,472	\$2,472
Grand Total					\$7,411	\$7,411
Employee Name is equal to / is in MITCHELL,JENNIFER and Employee Number is equal to / is in 00354071600 and Expense Status Code is equal to APPROVED, PAID and Date is between 01/01/2015 12:00:00 AM and 08/19/2015 12:00:00 AM						
Return - Print - Export - Create Bookmark Link						

- REPORT ID:** BI-R.EE.0009
- LAST REVISION:** 10/28/2015
- DESCRIPTION:** The Employee Expenses Summary report displays Employee Name, Employee Number, Expense Report Number, Submit Date, Source Expense Reason Name, Total Expense Amount by Expense Group, and Total Expense.
- PURPOSE/USE:**
 - Identify employee expenses.
- PROMPTS:** None
- DRILLDOWNS:** None
- GUIDED NAVIGATION TO:**
 - Click on Total Expense amount related to an employee and it will take the user to the BI-R.EE.0010 Employee Expenses Detail report.
- GUIDED NAVIGATION FROM:**
 - BI-R.EE.0004 Expenses by Employee
- LIGHT BULB NAVIGATION:** None
- DATA:**
 - The data included in this report is approved and paid.
- ADDITIONAL INFO:**

6. Employee Expenses Detail (report)

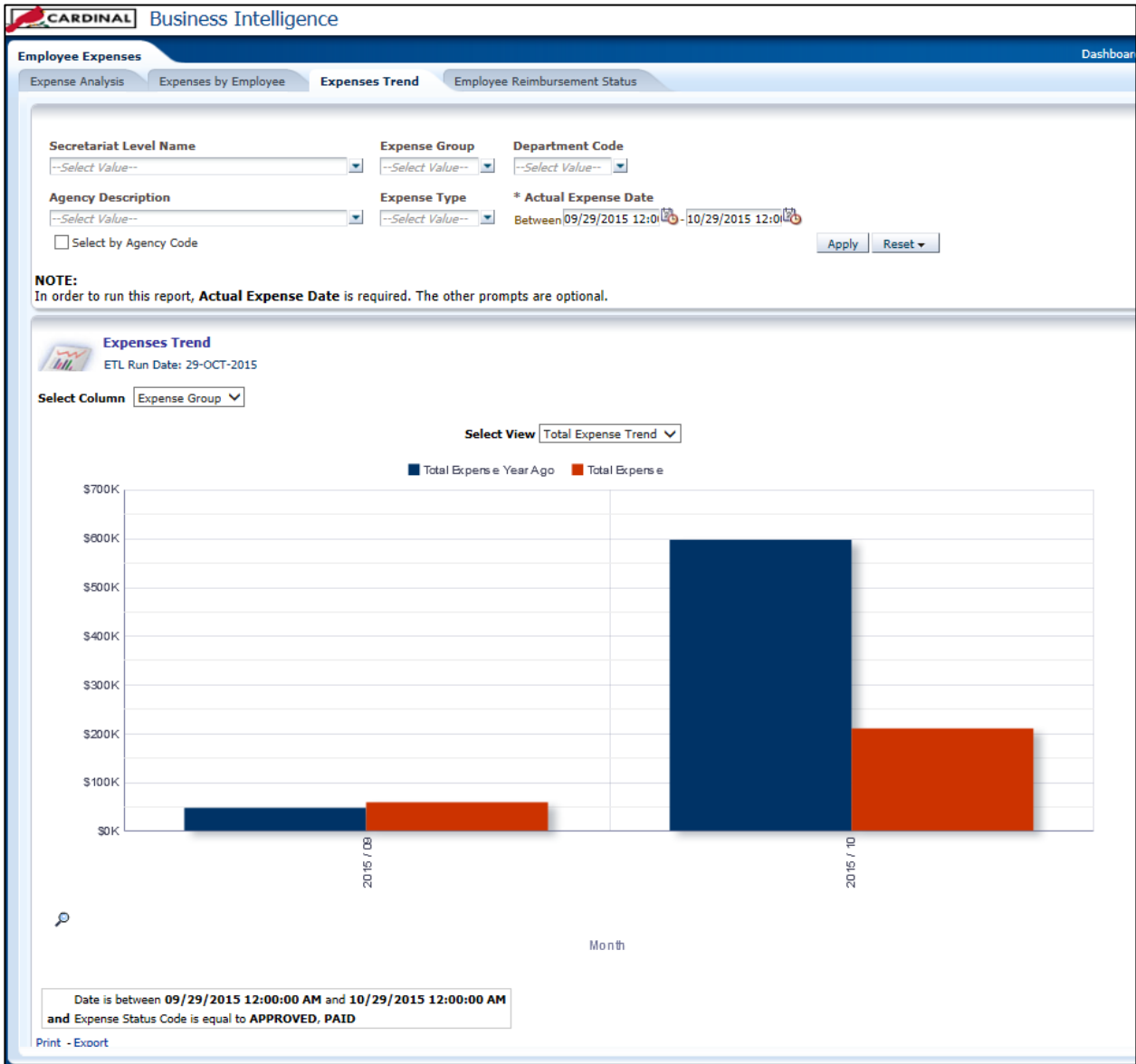
 Employee Expenses Detail <small>ETL Run Date: 19-AUG-2015</small>														
Employee Name	Employee Number	Agency Description	Agency Code	Department Description	Department Code	Submit Date	Expense Approval Date	Expense Report Number	Expense Report Line Number	Actual Expense Date	Expense Group	Expense Type	Expense Status Description	Total Expense
ADAMS,MICHAEL	00525858300	Senate	10000	Clerk's Administration	1100	8/17/2015	8/17/2015	0000067934	3	7/26/2015	Miscellaneous	Other Employee Reimbursements	Paid	\$18
ADAMS,MICHAEL	00525858300	Senate	10000	Clerk's Administration	1100	8/18/2015	8/18/2015	0000068085	3	8/1/2015	Miscellaneous	Other Employee Reimbursements	Paid	\$1,642
Grand Total														\$1,660

Employee Name is equal to / is in ADAMS,MICHAEL
 and Employee Number is equal to / is in 00525858300
 and Date is between 01/01/2015 12:00:00 AM and 08/19/2015 12:00:00 AM
 and Expense Status Code is equal to APPROVED, PAID

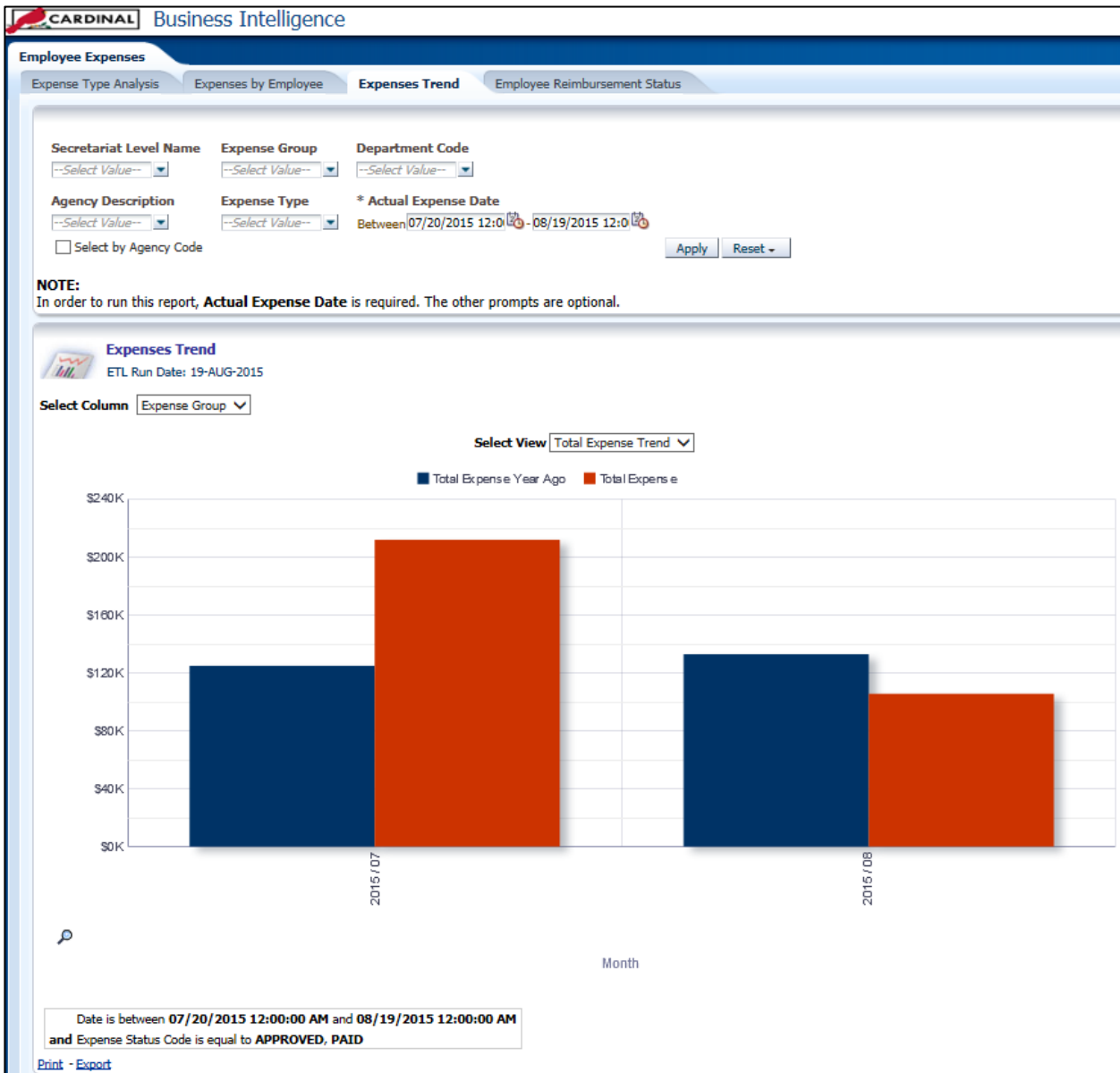
[Return](#) - [Print](#) - [Export](#) - [Create Bookmark Link](#)

- a. **REPORT ID:** BI-R.EE.0010
- b. **LAST REVISION:** 10/28/2015
- c. **DESCRIPTION:** The Employee Expenses Detail report displays Employee Name, Employee Number, Agency Description, Agency Code, Department Description, Department Code, Submit Date, Expense Approval Date, Expense Report Number, Expense Report Line Number, Actual Expense Date, Expense Group, Expense Type, Expense Status Description, and Total Expense Amount.
- d. **PURPOSE/USE:**
 - Identify employee expense detail.
- e. **PROMPTS:** None
- f. **DRILLDOWNS:** None
- g. **GUIDED NAVIGATION FROM:**
 - BI-R.EE.0004 Expenses by Employee
 - BI-R.EE.0009 Employee Expenses Summary
- h. **LIGHT BULB NAVIGATION:** None
- i. **DATA:**
 - The data included in this report is approved and paid.
- j. **ADDITIONAL INFO:**

Expenses Trend (dashboard page)



7. Expenses Trend (report)



- REPORT ID:** BI-R.EE.0005
- LAST REVISION:** 10/28/2015
- DESCRIPTION:** The Expenses Trend report displays multiple views to analyze and compare employee expenses. For example, based on the actual expense date entered, the graph will compare the data to the same time frame in the prior year.
- PURPOSE/USE:**
 - Identify expenses by Secretariat Level, Agency, Expense Group, Expense Type, Employee, and/or Department ID and compare to other time frames.

e. **PROMPTS:**

- Secretariat Level Name (optional)
- Agency Description/Agency Code (optional)
- Expense Group (optional)
- Expense Type (optional)
- Department Code (optional)
- Actual Expense Date Between (required)

f. **DRILLDOWNS:** None

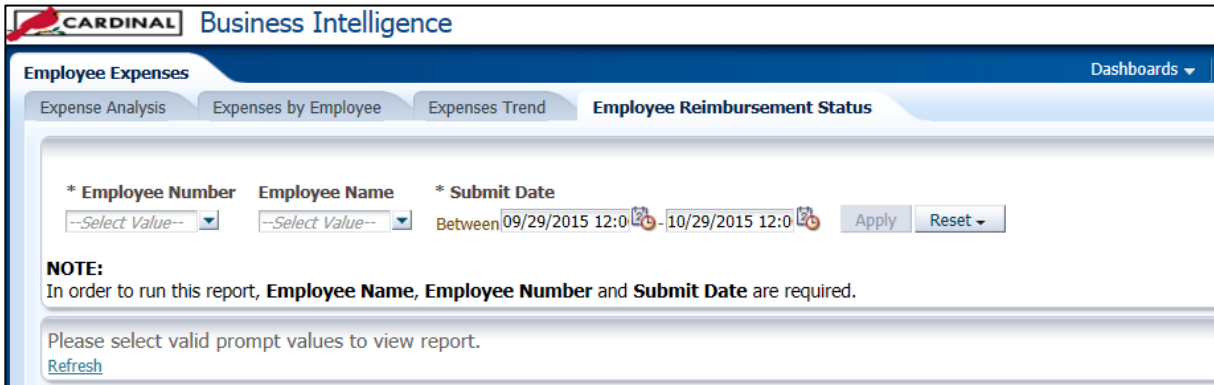
g. **GUIDED NAVIGATION:** None

h. **LIGHT BULB NAVIGATION:** None

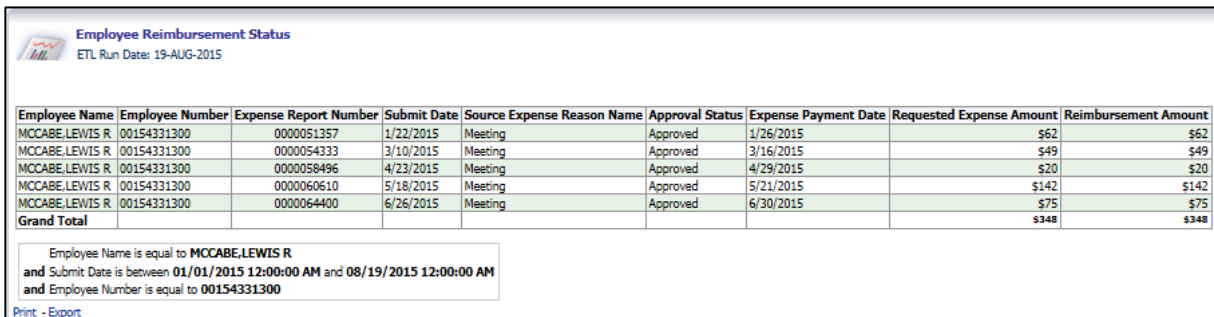
i. **DATA:** The data included in this report is approved and paid.

j. **ADDITIONAL INFO:**

Employee Reimbursement Status (dashboard page)



8. Employee Reimbursement Status (report)



Employee Name	Employee Number	Expense Report Number	Submit Date	Source Expense Reason Name	Approval Status	Expense Payment Date	Requested Expense Amount	Reimbursement Amount
MCCABE, LEWIS R.	00154331300	0000051357	1/22/2015	Meeting	Approved	1/26/2015	\$62	\$62
MCCABE, LEWIS R.	00154331300	0000054333	3/10/2015	Meeting	Approved	3/16/2015	\$49	\$49
MCCABE, LEWIS R.	00154331300	0000058496	4/23/2015	Meeting	Approved	4/29/2015	\$20	\$20
MCCABE, LEWIS R.	00154331300	0000060610	5/18/2015	Meeting	Approved	5/21/2015	\$142	\$142
MCCABE, LEWIS R.	00154331300	0000064400	6/26/2015	Meeting	Approved	6/30/2015	\$75	\$75
Grand Total							\$348	\$348

Employee Name is equal to MCCABE, LEWIS R.
and Submit Date is between 01/01/2015 12:00:00 AM and 08/19/2015 12:00:00 AM
and Employee Number is equal to 00154331300

[Print](#) - [Export](#)

- REPORT ID:** BI-R.EE.0002
- LAST REVISION:** 10/28/2015
- DESCRIPTION:** The Employee Reimbursement Status report displays employee information related to expense report numbers, submitted dates, approval status, payment dates, and amounts.
- PURPOSE/USE:**
 - Identify employee expense report status.
- PROMPTS:**
 - Employee Number (required)
 - Employee Name (required)
 - Submitted Date Between (required)
- DRILLDOWNS:** None
- GUIDED NAVIGATION:** None
- LIGHT BULB NAVIGATION:** None
- DATA:**
 - The data included in this report is posted to the ledger or waiting to be approved.
- ADDITIONAL INFO:**